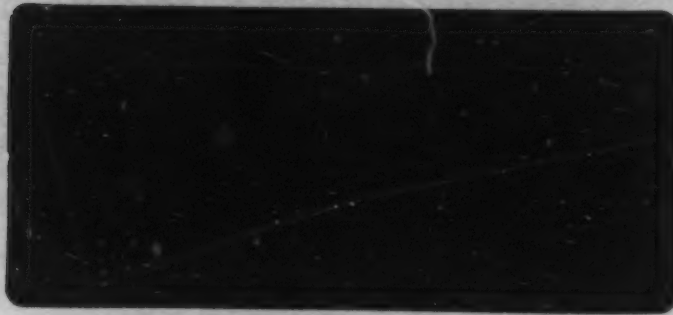


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FACT FILE

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

**Market Research Division
Fairchild Publications, New York**

Home Textiles

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HOME TEXTILES

Market Trends

Following a weak performance in 1982, when sales of home textiles remained relatively even at \$11.1 billion, HFD Home Textiles reports that the category rebounded in 1983, marking an increase at retail of 4%, attaining sales of \$11.5 billion. According to NPD Special Industry Services, a market research firm utilizing consumer panels, the only home textiles categories to register declines in reported consumer purchases in 1983 were bedspreads and pillows.

The home textiles market over the last several years has been characterized as highly promotion-oriented. Although most retailers are attempting to move away from the "52 week white sale" psychology, analysts believe that the majority of home textiles sales will continue to be consummated at sale prices. Industry insiders report that consumers have now grown so accustomed to buying home textiles while they are on sale, they are refusing to pay full price. Manufacturers are, however, making strides towards breaking this pattern by marketing new styles at full price while continuing to promote heavily on traditional categories. Another method manufacturers are using to avoid direct price competition is the signing of contracts with designers for lines of home textiles. This trend is increasing and is enabling manufacturers to maintain their profitability.

The fastest growing areas of the home textiles market in 1983 and 1984 are flannel sheets and kitchen textiles. Despite delivery problems in 1983, most retailers agree that flannel sheets were their fastest growing category in that year, accounting for about one-third of all sheet sales. Through the middle of 1984, manufacturers of flannel sheets were reporting orders coming in for larger quantities and at an earlier time, thus the production and delivery problems experienced in 1983 should be lessened.

Most analysts agree that the return of the economy from the recession of 1981-82 was the main reason for the growth of home textiles in 1983. Consumers, worried about the economy, had been holding back on discretionary spending and not spending for home textiles. As the recession eased, consumers became less cautious and began to purchase new houses which they decorated; or they redecorated their current residences.

New colors and designs are the major changes currently characterizing the home textiles industry. Most retailers agree that at the present time sales are shifting away from solid colors and more towards prints and jacquards. In the past, prints and jacquards were reported to represent 30% - 35% of the towel category, but in 1984, are reported to account for about 50% of sales.

Sheets and towels are currently the two largest segments of the home textiles industry, accounting for about one-quarter of industry sales combined. Although unit segments of sheets has always been greater than that for towels, it is expected that in 1984 this situation will reverse with shipments of towels surpassing those of sheets.

The continued health of the economy and the easing of interest rates are expected to have a positive effect on the home textiles industry. As personal disposable income rises, more people will buy new homes or redecorate their present ones and thus stimulate sales in the category.

GENERAL INDUSTRY STATISTICS

Preliminary data for the year 1982 has recently been released by the U.S. Bureau of the Census for two of the three classifications in the home textiles industry. Findings are based on a complete census of manufacturers classified in these industries, which is conducted by the Census Bureau every five years.

Compared with 1977 data, in terms of current dollars--which means they are not adjusted for inflation--the value of shipments of curtains and draperies increased 4.4%, while drapery hardware, blinds and shades marked an increase of 65%. The number of companies classified in these industries, however, registered declines in 1982 compared with 1977.

Data for 1982 for the home textiles, n.e.c. category, which is described in detail on the following page has not yet been released by the Census Bureau. However, data for 1981 indicates that since 1977, shipments have grown 24.1% to nearly \$3 billion.

Curtains & Draperies (SIC 2391*)

	<u>1982(p)</u>	<u>1977</u>	<u>% Change</u> <u>1982/1977</u>
Number of companies	1,319	1,650	- 20.1%
Number of establishments	1,370	1,712	- 20.0
Number with 20 or more employees	253	324	- 21.9
Employees, total (thous.)	24.0	31.7	- 24.3
Production workers (thous.)	19.7	27.2	- 27.6
Payroll (mil. \$)	\$ 233.4	\$ 224.7	+ 3.9
Value added by manufacture (mil. \$)#	na	407.3	--
Value of industry shipments (mil. \$)##	1,057.4	1,013.1	+ 4.4
Capital expenditures, new (mil. \$)	7.2	7.2	--

Home Textiles, n.e.c. (SIC 2392*)

	<u>1981</u>	<u>1977</u>	<u>% Change</u> <u>1981/1977</u>
Number of companies	na	980	--
Number of establishments	840	1,051	- 20.1%
Number with 20 or more employees	381	403	- 5.5
Employees, total (thous.)	23.2	47.5	- 51.2
Production workers (thous.)	19.1	39.8	- 52.0
Payroll (mil. \$)	\$ 221.5	\$ 366.4	- 39.5
Value added by manufacture (mil. \$)#	1,127.2	782.9	+ 44.0
Value of industry shipments (mil. \$)##	2,846.3	2,294.0	+ 24.1
Capital expenditures, new (mil. \$)	18.8	26.9	- 30.1

(continued)

GENERAL INDUSTRY STATISTICS

Drapery Hardware, Blinds & Shades (SIC 2591*)

	1982(p)	1977	% Change 1982/1977
Number of companies	400	435	- 8.0%
Number of establishments	430	456	- 5.7
Number with 20 or more employees	126	85	+ 48.2
Employees, total (thous.)	15.7	13.6	+ 15.4
Production workers (thous.)	11.7	10.3	+ 13.6
Payroll (mil. \$)	\$ 223.4	\$ 145.6	+ 53.4
Value added by manufacture (mil. \$)#	na	345.0	--
Value of industry shipments (mil. \$)##	1,113.7	675.0	+ 65.0
Capital expenditures, new (mil. \$)	31.2	16.7	+ 86.8

n.e.c. not elsewhere classified

na not available

(p) preliminary

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2391 covers establishments primarily engaged in manufacturing curtains and draperies from purchased materials.

SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments primarily engaged in manufacturing of home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Blankets that are made in weaving mills are not included in this industry, nor are tufted bath mats or other tufted items.

SIC 2591 covers establishments primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, is covered on pages 14-17.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982, 1977
Annual Survey of Manufactures, 1981
County Business Patterns 1981

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average employment in the curtains and draperies industry increased 4.2% in 1983, reaching 25.0 thousand persons. By April 1984, the number of employees in the industry was 26.6 thousand, an increase of 11.7% over April 1983. This trend towards increased employment also continued in the home textiles, n.e.c., segment. After increasing 6.2% to an average of 50,000 employees in 1983, employment stood at 51,700 in April 1984. This was 7.0% higher than the number in April 1983.

Production workers in the curtain and drapery industry worked an average of 38.3 hours per week, (excluding overtime) in 1983 compared with 35.0 in 1982. During this same period, the average hourly earnings climbed 9.4%. The same pattern held in the home textiles, n.e.c. segment where average weekly hours rose 4.3% and average hourly earnings climbed 4.2%.

Some differences will be noted for average employment data on an annual basis compiled by the U.S. Bureau of Labor Statistics and by the U.S. Census Bureau due to a difference in methodology in compiling this data.

Employment & Earnings in the Home Textiles Industry

	<u>April</u>		<u>Annual Average</u>		<u>% Change</u> <u>1983/1982</u>
	<u>1984 (p)</u>	<u>1983</u>	<u>1983</u>	<u>1982</u>	
Curtains & draperies (SIC 2391)					
All employees (thous.)	26.6	23.8	25.0	24.0	+ 4.2%
Production workers (thous.)	21.8	19.5	20.4	19.5	+ 4.6
Avg. weekly earnings	\$197.36	\$188.28	\$188.44	\$162.75	+ 15.8
Avg. hourly earnings	5.18	4.84	4.92	4.65	+ 5.8
Avg. weekly hours	38.1	38.9	38.3	35.0	+ 9.4
Home textiles, n.e.c. (SIC 2392)					
All employees (thous.)	51.7	48.3	50.0	47.1	+ 6.2%
Production workers (thous.)	44.1	40.5	42.1	39.0	+ 7.9
Avg. weekly earnings	\$ 217.67	\$ 212.01	\$212.07	\$195.14	+ 8.7
Avg. hourly earnings	5.61	5.45	5.41	5.19	+ 4.2
Avg. weekly hours	38.8	38.9	39.2	37.6	+ 4.3

n.e.c. not elsewhere classified.

(p) preliminary

Source: Bureau of Labor Statistics,
Employment & Earnings

GENERAL INDUSTRY STATISTICS

Industry Concentration

The Census Bureau reported that in 1981 the home textile industry was characterized by small producers who had less than ten employees. This was particularly true in the curtains and draperies segment where 61.6% of plants had fewer than 10 employees.

Number of Home Textiles Manufacturing Establishments By Employment Size, 1981

	<u>Curtains & Draperies (SIC 2391)</u>		<u>Home Textiles, n.e.c. (SIC 2392)</u>		<u>Drapery Hardware, Blinds & Shades (SIC 2591)</u>	
	<u>No.</u>	<u>% of Total</u>	<u>No.</u>	<u>% of Total</u>	<u>No.</u>	<u>% of Total</u>
Total establishments*	1,292	100.0%	840	100.0%	381	100.0%
Employment size:						
Under 10 employees	796	61.6	333	39.6	210	55.1
10-49 employees	381	29.5	292	34.8	121	31.8
50-249 employees	98	7.6	183	21.8	36	9.4
250 or more employees	17	1.3	32	3.8	14	3.7

n.e.c. not elsewhere classified.

* Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
County Business Patterns 1981.

According to estimates compiled by Sales & Marketing Management Magazine, plants in the home textiles industry which have 100 or more employees account for a minimum of 59% of industry shipments. The highest percentage was for drapery hardware, blinds and shades. Plants with 100 or more employees accounted for 67% of shipments.

Employment & Share of Industry Shipments in Large Plants In the Home Textiles Industry, 1983

	<u>Number of Plants</u>		<u>% of Industry Shipments Accounted For By Plants With 100 or More Employees</u>
	<u>With 20+ Employees</u>	<u>With 100+ Employees</u>	
Curtains & draperies (SIC 2391)	339	69	59%
Home textiles, n.e.c. (SIC 2392)	352	96	64
Drapery hardware, blinds & shades (SIC 2591)	152	28	67

n.e.c. not elsewhere classified.

Source: Sales & Marketing Management,
"Survey of Industrial Purchasing Power,"
April, 1984. All rights reserved.

GENERAL INDUSTRY STATISTICS

Operating Ratios

Concentration Ratios in the Home Textiles Industry, 1977

	Value of Shipments (Mil. \$)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Curtains & draperies (SIC 2391)	\$1,013.1	25.7%	35.7%	48.9%	61.6%
Home textiles, n.e.c. (SIC 2392)	2,294.0	22.0	33.4	47.9	65.5
Drapery hardware, blinds & shades (SIC 2591)	675.1	45.5	64.6	81.0	88.0

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Manufacturing Ratios in the Home Textiles Industry, 1980 (Median Results)

	Curtains & Draperies (SIC 2391)	Home Textiles n.e.c. (SIC 2392)	Drapery Hardware, Blinds & Shades (SIC 2591)
Number of firms reporting	204	176	78
Current assets to current debt (times)	2.61	1.85	2.75
Net profit on net sales (percent)	6.06%	1.89%	5.79%
Net profit on net worth (percent)	24.02%	17.45%	25.04%
Net sales to net worth (times)	5.13	6.44	4.67
Net sales to inventory (times)	11.7	7.1	9.8

n.e.c. not elsewhere classified.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980.
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GENERAL INDUSTRY STATISTICS

Leading Manufacturers

Market Share of Leading Towel Manufacturers, 1983

<u>Manufacturers</u>	<u>Percent of Total Retail Sales</u>
Cannon Mills	34%
J.P. Stevens	20
Fieldcrest	18
West Point Pepperell	15
All others	13

Source: Home Fashions Textiles, Fairchild Publications
(June 1984)

By Region

Preliminary information on the number of plants (establishments), employment and shipments by states for the home textiles industry has been released by the Census Bureau based on the 1982 census of manufactures.

North Carolina accounted for 14.9% of curtain and draperies shipments followed by Massachusetts with 12.3%. California accounted for 12.9% of drapery hardware, blinds and shades shipments.

Leading Manufacturing States in Home Textiles & Related Products, 1982*

	<u>Number of Establishments</u>		<u>Number of Employees (Thousands)</u>	<u>Value of Shipments (Mil. \$)</u>
	<u>Total</u>	<u>With 20+ Employees</u>		
Curtains & draperies (SIC 2391)				
U.S. total	1,370	253	24.0	\$1,057.4
Leading states:				
California	319	43	3.3	124.5
New York	108	27	1.8	126.1
Florida	105	11	1.0	37.5
Texas	100	16	1.7	86.0
Illinois	57	6	2.1	18.1
Pennsylvania	54	12	0.8	23.3
Massachusetts	51	29	2.8	129.9
New Jersey	38	5	0.6	19.2
North Carolina	34	14	3.6	157.6
Georgia	31	12	1.4	86.9
Indiana	27	8	0.7	32.8
South Carolina	17	7	0.5	15.2
Alabama	15	4	0.5	13.6

(continued)

GENERAL INDUSTRY STATISTICS

By Region

Leading Manufacturing States in Home Textiles & Related Products, 1982* (continued)

	Number of Establishments		Number of Employees (Thousands)	Value of Shipments (Mil. \$)
	Total	With 20+ Employees		
Drapery hardware, blinds & shades (SIC 2591), U.S. total	430	126	15.7	\$1,113.7
Leading states:				
New York	74	15	1.1	66.2
California	57	20	2.6	144.5
Florida	57	15	0.7	44.4
Texas	29	10	0.7	53.8
Illinois	24	7	1.3	110.0
New Jersey	23	9	1.5	72.3
Pennsylvania	16	4	0.5	46.3
Connecticut	11	11	0.7	39.6
Michigan	9	2	(D)	(D)
Georgia	8	2	0.6	30.0
Maryland	8	3	(D)	(D)
Wisconsin	5	3	(D)	(D)
Rhode Island	1	1	(D)	(D)

* preliminary figures

(D) withheld to avoid disclosure

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Preliminary Industry Series.

PRODUCTION

The U.S. Bureau of the Census issues quarterly reports on production and shipments of sheets, pillowcases and towels in their Current Industrial Reports series. These reports are based on surveys made among all U.S. firms engaged in the manufacture of these products.

While domestic production of sheets (flat and fitted) remained even in the first quarter of 1984 compared with the same period in 1983, production of pillowcases, terry-woven towels, huck and crash towels and terry washcloths all registered significant declines. These three classifications recorded declines of 3.1%, 6.2% and 7.0%, respectively.

Preliminary data for the full year 1983 indicates that the declines registered by home textiles in 1982 had reversed. Every major category measured in 1983 recorded increased production. The largest gains were recorded by terry-woven towels, up 21.6% to 50.1 million dozen; pillowcases, up 14.2% to 13.6 million dozen.

Revised production figures for 1981 and 1982 are summarized below.

PRODUCTION

Production of Sheets, Pillowcases & Towels, 1981, 1982

	Quantity (Thous. Dozen Units)		% Change 1982/1981
	1982	1981	
Sheets & pillowcases, total	26,812	31,853	- 15.8%
Crib size sheets	538	641	- 16.1
Total sheets	14,285	16,771	- 14.8
By type:			
Flat sheets	8,601	10,102	- 14.9
Polyester/cotton blends	8,306	9,722	- 14.6
All other fabrics & blends	295	380	- 22.4
Fitted sheets	5,684	6,669	- 14.8
Polyester/cotton blends	5,417	6,355	- 14.8
All other fabrics & blends	267	284	- 6.0
Pillowcases, total	11,989	14,441	- 17.0
Polyester/cotton blends	11,482	13,781	- 16.7
All other fabrics & blends	507	660	- 23.2
Finished terry towels, total	41,167	44,931	- 8.4
By type:			
Sheared	15,198	17,283	- 12.1
Nonsheared	25,969	27,648	- 6.1
By end use:			
Kitchen	5,110	6,140	- 16.8
Bath size	19,208	21,102	- 9.0
Hand, face, guest & fingertip	15,445	15,829	- 2.4
Bath/tub mats	474	542	- 12.5
All other towels, including larger than bath, i.e., queen/king bath towels, beach towels, etc.	930	1,318	- 29.4
Huck & crash towels including dish towels	26,467	25,892	+ 2.2
Terry washcloths	22,209	22,670	- 2.0

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels,
MQ-23X(82)-5.

Current production estimates of other types of home textiles, not covered in the U.S. Bureau of the Census reports, are available from the National Cotton Council of America. This source indicates that the turn-around in production of sheets, pillowcases and towels carried over into almost all the other segments of the home textiles industry. The only category to report a decline in production was the mattress-covers group, which showed a slight decline of 1.0%.

The largest increase in production reported by the National Cotton Council in 1983 was on comforters and quilts, which registered an increase of 28.8% to 17,854,000 units.

PRODUCTION

Production of Selected Home Textiles by Type, 1982, 1983

	Unit of Measure	1983(p)	1982	% Change 1983/1982
Curtains, excluding shower	1,000 sets	115,458	104,764	+ 10.2%
Lace		1,748	1,433	+ 22.0
Other, principally woven		113,710	103,331	+ 10.0
Cafe, tiered & cottage		64,795	58,863	+ 10.1
Ruffled		5,916	5,378	+ 10.0
Shortie drapes		11,965	10,877	+ 10.0
Tailored		31,034	28,213	+ 10.0
Drapery, upholstery & slip				
cover fabrics	1,000 lin. yds.	820,079	745,729	+ 10.0
Drapery fabrics		469,340	417,919	+ 12.3
Mainly woven		401,145	354,169	+ 13.3
Lining, woven		68,195	63,750	+ 7.0
Upholstery & slip covers fabrics	1,000 lin. yds.	350,739	327,810	+ 7.0
Coated		56,103	52,450	+ 7.0
Knit		16,257	15,210	+ 6.9
Woven		39,846	37,240	+ 7.0
Uncoated, woven		294,636	275,360	+ 7.0
Window shades, woven, plastic & nonwoven	1,000 units	21,220	24,965	- 15.0
Slip covers, furniture, excluding plastic	1,000 units	7,861	7,602	+ 3.4
Knit		6,263	6,081	+ 3.0
Slip covers		2,505	2,432	+ 3.0
Throw covers		3,758	3,649	+ 3.0
Woven		1,598	1,521	+ 5.1
Slip covers		144	137	+ 5.1
Throw covers		767	730	+ 5.1
Sleep covers		687	654	+ 5.0
Comforters & quilts, excluding filling	1,000 units	17,854	13,867	+ 28.8
Bedspreads	1,000 units	27,158	26,207	+ 3.6
Tailored		16,852	15,604	+ 8.0
Tufted		2,686	2,827	- 5.0
Woven		7,620	7,776	- 2.0
Jacquard		3,200	3,266	- 2.0
Other woven		4,420	4,510	- 2.0
Mattress coverings, woven & plastic	1,000 units	2,794	2,822	- 1.0
Pads, quilted, excluding fillings	1,000 units	27,012	26,482	+ 2.0
Bassinet, crib & furniture, woven & plastic		5,132	5,138	- 0.1
Mattress, woven		21,880	21,344	+ 2.5

(continued)

PRODUCTION

Production of Selected Home Textiles by Type, 1982, 1983 (continued)

	<u>Unit of Measure</u>	<u>1983(p)</u>	<u>1982</u>	<u>% Change 1983/1982</u>
Pillows & cushions, excluding fillings, woven	1,000 units	64,838	61,336	+ 5.7%
Bed		41,537	39,559	+ 5.0
Decorative		23,301	21,777	+ 7.0
Textile table cloths, napkins & place mats, excluding plastic	1,000 sq. yds.	128,129	112,296	+ 14.1
Damask		17,303	15,312	+ 13.0
Lace		21,169	17,641	+ 20.0
Other, woven		89,657	79,343	+ 13.0
Coated		19,724	17,455	+ 13.0
Uncoated		69,933	61,888	+ 13.0
Blankets & blanketing	1,000 lin. yds.	77,936	71,637	+ 8.8
Bed		70,607	64,733	+ 9.1
Thermal woven		22,263	18,323	+ 21.5
Cotton		3,574	2,749	+ 30.0
Other		18,689	15,574	+ 20.0
Other woven & non-woven		48,344	46,410	+ 4.2
Cotton & cotton blends		9,171	8,818	+ 4.0
Other		39,173	37,592	+ 4.2
Crib & receiving		7,329	6,904	+ 6.2
Thermal woven		1,075	890	+ 20.8
Cotton		131	103	+ 27.2
Other		944	787	+ 19.9
Other woven & non-woven		6,254	6,014	+ 4.0
Cotton & cotton blends		4,344	4,177	+ 4.0
Other		1,910	1,837	+ 4.0

(p) preliminary

Source: National Cotton Council of America,
Cotton Counts Its Customers,
1984 Edition.

MATERIALS CONSUMED IN PRODUCTION

The 1982 census of manufactures report on the home textiles industry included the cost of materials consumed or put into production by plants classified in this industry. Following are findings compared with the previous census data, covering the year 1977.

MATERIALS CONSUMED IN PRODUCTION

Delivered Cost of Materials Consumed in the Production of Home Textiles, 1977, 1982

	Delivered Cost (Mil. \$)		% Change 1982/1977
	1982	1977	
Curtains & draperies (SIC 2391)			
Materials, containers & supplies, total	\$563.4	\$542.5	+ 3.9%
Broad woven fabrics:			
Cotton	42.0	113.3	- 62.9
Rayon & acetate	53.6	85.8	- 37.5
Nylon	1.8	11.0	- 83.6
Polyester	131.7	101.6	+ 29.6
Other broad woven fabrics	71.0	41.4	+ 71.5
Plastics products consumed	0.6	1.1	- 45.4
All other materials, containers & supplies, including n.s.k.	262.7	188.5	+ 39.5

na not available

n.e.c. not elsewhere classified.

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Industry Series.

According to the Textile Economics Bureau, every category of home textiles recorded a decrease in consumption of fibers between 1981 and 1982. The largest of these declines was in the curtains group which measured a 25.5% decrease to 61.3 million pounds of fiber.

The largest category measured, sheets and other bedding, recorded a decline of 16.9% during the period, falling from 534.4 million pounds to 444.0 million pounds.

Consumption of Fibers in Selected Home Textiles, 1981, 1982

	Millions of Pounds		% Change 1982/1981
	1982	1981	
Curtains, total ¹	61.3	82.2	- 25.5%
Man-made fibers, total	53.3	73.4	- 27.4
Cellulosic yarn	1.3	5.6	- 76.8
Cellulosic staple	5.3	6.8	- 22.1
Noncellulosic yarn	18.3	25.2	- 27.4
Noncellulosic staple	28.4	35.8	- 20.7
Cotton	8.0	8.8	- 9.1

(continued)

MATERIALS CONSUMED IN PRODUCTION

Consumption of Fibers in Selected Home Textiles, 1981, 1982 (continued)

	<u>Millions of Pounds</u>		<u>% Change</u>
	<u>1982</u>	<u>1981</u>	<u>1982/1981</u>
Drapery & upholstery, total ²	376.5	468.0	- 19.6
Man-made fibers, total	245.2	322.7	- 24.0
Cellulosic yarn	15.9	21.4	- 25.7
Cellulosic staple	57.7	91.4	- 36.9
Noncellulosic yarn	79.4	103.5	- 23.3
Noncellulosic staple	92.2	106.4	- 13.3
Cotton	119.8	132.6	- 9.7
Wool	11.5	12.7	- 9.4
Blankets & blanketing, total ³	79.2	90.5	- 12.5
Man-made fibers, total	68.0	78.9	- 13.8
Noncellulosic yarn	2.5	3.5	- 28.6
Noncellulosic staple	65.5	74.5	- 12.1
Cotton	7.2	7.1	+ 1.4
Wool	4.0	4.5	- 11.1
Bedspreads & quilts, total ⁴	116.8	125.4	- 6.9
Man-made fiber, total	70.2	75.7	- 7.3
Cellulosic yarn	3.8	4.9	- 22.4
Cellulosic staple	2.4	3.1	- 22.6
Noncellulosic yarn	14.0	15.7	- 10.8
Noncellulosic staple	50.0	52.0	- 3.8
Cotton	46.6	49.7	- 6.2
Towels & toweling, total ⁵	306.6	326.7	- 6.2
Man-made fibers, total	28.7	32.6	- 12.0
Cellulosic staple	0.6	0.9	- 33.3
Noncellulosic yarn	0.8	0.3	+166.7
Noncellulosic staple	27.3	31.4	- 13.1
Cotton	277.9	294.1	- 5.5
Sheets & other bedding, total ⁶	444.0	534.4	- 16.9
Man-made fibers, total	243.4	299.5	- 18.7
Cellulosic yarn	3.9	2.6	+ 50.0
Cellulosic staple	10.6	13.8	- 23.2
Noncellulosic yarn	43.2	34.0	+ 27.1
Noncellulosic staple	185.7	249.1	- 25.5
Cotton	200.6	234.9	- 14.6
Other home furnishings, total ⁷	57.3	66.8	- 14.2
Man-made fiber, total	35.7	43.0	- 17.0
Cellulosic yarn	1.1	1.2	- 8.3
Cellulosic staple	1.1	2.3	- 52.6
Noncellulosic yarn	20.5	15.8	+ 29.7
Noncellulosic staple	13.0	23.7	- 45.1
Cotton	21.6	23.8	- 9.2

(continued)

MATERIALS CONSUMED IN PRODUCTION

(Footnotes from Preceding Table)

1. Lace, ruffled, cottage, cafe, tiered, shortie drapes & tailored.
2. Includes furniture slipcovers and vinyl-coated fabrics for upholstery. Also includes the backing and headers of drapery fabrics. The cotton data includes cotton drapery linings.
3. Includes tailored and throw spreads (tufted and woven), as well as their backing, comforters and their outer shell.
4. Includes woven, knitted, needle-punched and flocked full-sized and crib blankets and electric blanket shells as well as the woven acetate or nylon filament yarn bindings. Sizable poundages of rayon, acrylic, nylon and wool waste are also included.
5. Includes woven hand, bath, dish and other towel types. The large cotton waste poundage used in these products is not included.
6. Sheets includes pillowcases. Other bedding includes the outside cover of quilted pads, mattress pads, mattresses and innersprings, cots and sleeping bags.
7. Includes woven and lace napery, such as tablecloths, napkins and doilies. Also includes man-made fibers used in insect screening and netting as well as cotton used in window shades.

Source: Textile Economics Bureau, Inc.,
Textile Organon, (November 1983).

SHIPMENTS

Preliminary data on the quantity and value of shipments indicates that all five measured categories of home textiles registered increases in 1983 compared to 1982. However, after the dramatic fall in shipments in 1982, the 1983 increase does not return the category to its 1981 levels.

The largest gain in shipments in 1983 was in terry towels, which rose 24.5% on a quantity basis and 22.5% in dollar volume. The second largest increase was recorded by terry washcloths up 11.7% in units and 14.8% in dollars.

Quantity & Value of Shipments, 1982, 1983
 (Quantity in 1,000 doz.; value \$1,000)

	Quantity			Value		
	1983(p)	1982	% Change 1983/1982	1983(p)	1982	% Change 1983/1982
Sheets, flat & fitted	15,102	14,193	+ 6.4%	\$883,661	\$851,332	+ 3.8%
Crib sheets	579	538	+ 7.6	19,107	17,546	+ 8.9
Terry towels	51,368	41,270	+ 24.5	988,916	807,191	+ 22.5
Pillow cases	12,998	12,247	+ 6.1	240,762	238,367	+ 1.0
Terry washcloths	24,017	21,496	+ 11.7	131,999	114,944	+ 14.8

Source: U.S. Bureau of the Census,
 Current Industrial Reports,
Sheets, Towels & Pillow Cases,
 MQ23X(83)-4; MQ23X(83)-3; MQ23X(83)-2

SHIPMENTS

A more detailed report on the quantity and value of shipments for selected home textiles is available for 1982 and 1981 as shown below.

Quantity & Value of Shipments of Sheets, Pillowcases & Towels By All Producers, 1981, 1982

	Quantity (Thous. Units)			Value of Shipments (Mil. \$)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Sheets & pillowcases, total	27,032	31,070	- 13.0%	\$1,107.2	\$1,226.0	- 9.7%
Crib size sheets	565	616	- 8.3	17.5	18.1	- 3.3
Total sheets	14,193	16,310	- 13.0	851.3	941.2	- 9.5
By type:						
Flat sheets	8,711	9,980	- 12.7	520.9	575.8	- 9.5
Polyester/cotton blends	8,371	9,562	- 12.5	499.7	546.3	- 8.5
All other fabrics & blends	340	418	- 18.7	21.2	29.5	- 28.1
Fitted sheets	5,482	6,330	- 13.4	330.5	365.4	- 9.6
Polyester/cotton blends	5,216	6,002	- 13.1	313.7	343.4	- 8.6
All other fabrics & blends	266	328	- 18.9	16.7	22.1	- 24.4
By size:						
King size	1,211	1,272	- 4.8	117.3	121.2	- 3.2
Queen size	2,185	2,315	- 5.6	175.9	182.0	- 3.4
Full size	4,962	6,092	- 18.5	285.1	336.0	- 15.1
Twin size	5,513	6,213	- 11.3	259.0	286.6	- 9.6
Single size & smaller	322	418	- 23.0	14.0	16.4	- 14.6
Pillowcases, total	12,274	14,144	- 13.2	238.4	266.7	- 10.6
Polyester/cotton blends	11,722	13,448	- 12.8	227.0	251.4	- 9.7
All other fabrics & blends	552	696	- 20.7	11.3	15.3	- 26.1
Finished terry towels, total	41,267	43,247	- 4.6	812.8	850.5	- 4.4
By type:						
Sheared	14,557	16,466	- 11.6	305.5	356.6	- 14.3
Nonsheared	26,710	26,781	- 0.3	507.3	493.8	+ 2.7
By end use:						
Kitchen	5,187	5,873	- 11.7	43.1	42.9	+ 0.5
Bath size	19,177	20,291	- 5.5	515.3	541.8	- 4.9
Hand, face, guest & fingertip	15,493	15,428	+ 0.4	194.2	203.4	- 4.5
Bath/tub mats	516	519	- 0.6	19.2	18.3	+ 4.9
All other towels, including queen/king bath towels, beach towels, etc.	894	1,136	- 21.3	40.9	44.1	- 7.3
Terry towels sold for further processing elsewhere (i.e., blanks)	6,626	5,820	+ 13.8	90.6	81.8	+ 10.8
Huck & crash towels, including dish towels	26,152	26,710	- 2.1	18.7	18.4	+ 1.6
Terry washcloths	21,496	22,283	- 3.5	114.9	120.8	- 4.9

Source: U.S. Bureau of the Census, Current Industrial Reports
Sheets, Pillowcases & Towels, MQ-23X(82)-5

SHIPMENTS

The latest source of information on shipments of home textiles, other than sheets, pillowcases and towels, is in preliminary data from the 1982 census of manufactures. In the table below, this data is compared with findings in the last census, covering the year 1977.

Quantity & Value of Shipments of Curtains & Draperies
Shipped by All Producers, 1977, 1982
 (Quantity in million units unless otherwise noted)

	Quantity			Value (Mil. \$)		
	1982(p)	1977	% Change 1982/1977	1982(p)	1977	% Change 1982/1977
Curtains & draperies, except lace total (in millions of pairs or sets)	na	na	--	\$986.2	\$936.7	+ 5.3%
Window curtains:						
Wholly or chiefly cotton	9.4	14.9	- 36.9%	58.2	45.6	+ 27.6
Wholly or chiefly man-made:						
Glass fiber fabrics	1.1	1.6	- 31.3	5.8	7.7	- 24.7
Other man-made fabrics	46.4	37.4	+ 24.1	199.9	162.8	+ 22.8
Other materials, including plastics	4.4	2.0	+120.0	25.6	17.7	+ 44.6
Draperies:						
Wholly or chiefly cotton	(S)	12.5	--	76.6	12.73	- 39.8
Wholly or chiefly man-made:						
Glass fiber fabrics	(S)	2.9	--	12.8	20.1	- 36.3
Other man-made fabrics	17.3	26.0	33.5	250.4	256.6	- 5.7
Other materials, including plastics	4.9	2.4	+104.2	55.1	26.6	+107.1
Curtains & draperies, n.s.k.	na	na	--	301.8	263.3	+ 14.6

(p) preliminary

(S) suppressed, does not meet publication standards.

Source: U.S. Department of Commerce,
 1982 Census of Manufactures,
 Preliminary Report Industry Series,
 MC82-I-23E-1(P) July 1984

SHIPMENTS

Quantity & Value of Shipments of Drapery Hardware, Blinds & Shades Shipped
By All Producers, 1977, 1982
 (Quantity in millions of units, unless otherwise noted)

	Quantity			Value (Mil. \$)		
	1982(p)	1977	% Change 1982/77	1982(p)	1977	% Change 1982/77
Drapery hardware, blinds & shades, total	na	na	--	\$986.3	\$615.3	+ 60.3%
Window shades & accessories	na	na	--	179.6	140.3	+ 28.0
Plastic window shades	33.5	29.3	+14.3%	108.4	63.0	+ 72.1
Other window shades	(S)	(S)	--	52.6	48.6	+ 8.2
Window shades & rollers sold separately	na	na	--	9.6	18.7	- 48.7
Window shades & accessories, n.s.k.	na	na	--	9.0	10.0	- 10.0
Venetian blinds	na	na	--	406.5	99.0	+310.6
Complete, incl. vertical & horizontal:						
Aluminum slat blinds	(S)	(S)	--	245.4	52.3	+369.2
All others	(S)	(D)	--	84.7	(D)	--
Unassembled blinds, parts & components	na	na	--	70.7	(D)	--
Venetian blinds, n.s.k.	na	na	--	5.7	13.0	- 56.2
Other shades & blinds, n.e.c., & curtain & drapery poles & other hardware	na	na	--	288.9	320.3	- 9.8
Other shades & blinds, exc. canvas & other textile fabrics, incl. wood, metal, plastics, chip, bamboo, rattan, reed, etc.	na	na	--	42.0	72.1	- 41.7
Curtain & drapery rods, poles, fixtures fabricated in the same plant, exc. window shade accessories	na	na	--	238.7	341.3	- 30.0
Other shades & blinds, n.s.k.	na	na	--	8.2	6.9	+ 18.8
Drapery hardware, blinds & shades, n.s.k.	na	na	--	111.3	55.7	+ 99.8

(p) preliminary

na not available

(S) suppressed, does not meet publication standards

(D) Withheld to avoid disclosure

n.s.k. not specified by kind

Source: U.S. Department of Commerce,
 1982 Census of Manufactures,
Preliminary Reports, Industry Series
 MC82-I-25B-6(P), March 1984.

PRODUCER PRICES

In June 1983, the Bureau of Labor Statistics redefined the producer price index categories covering the home textiles market. Therefore, a full year's change in the producer price index is not yet available.

The latest producer price indexes available are shown below.

Producer (Factory) Price Indexes for Home Textiles (June 1983 = 100)

	<u>March</u> <u>1984</u>	<u>June</u> <u>1983</u>	<u>Percent</u> <u>Change</u>
Specified home textiles	100.2	100.0	+ 0.2%
Home textiles, except spreads, towels, sheets, pillowcases, washcloths	98.7	100.0	- 1.3
Shower/bath curtains, incl. plastic	82.0	100.0	- 18.0
Comforters & wadded quilts	98.0	100.0	- 2.0
Napkins, exc. paper	92.8	100.0	- 7.2
Place mats & place mat sets, incl. plastic	88.6	100.0	- 11.4
Bed pillows	101.4	100.0	+ 1.4
Fancy pillows & cushions	105.3	100.0	+ 5.3
Foam	101.4	100.0	+ 1.4
Bed spreads & sets	101.2	100.0	+ 1.2
Quilted bed spreads & sets	101.1	100.0	+ 1.1
Sheets & pillowcases made from woven fabric	102.7	100.0	+ 2.7
Towels & washcloths from woven material	102.0	100.0	+ 2.0
Terry woven towels, sheared & nonsheared	102.9	100.0	+ 2.9
Other terry woven towels	101.3	100.0	+ 1.3

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Department of Commerce, seven out of eight measured categories of home textile imports registered gains in 1983. The only group to mark a decline was cotton shop towels.

The largest home textile classification in import data covered in 1983 was towels of vegetable fibers. The value of imports reached \$117.9 million in 1983.

This increase in imports has accelerated over the first four months of 1984. During this period the U.S. Department of Commerce reported (HFD - July 2, 1984) that U.S. imports of all-cotton sheets jumped 146.2% to 27% of the U.S. market, while cotton towel imports were up 47.4%, moving to 14% of the market.

FOREIGN TRADE

Imports

Imports of Specified Home Textiles
By Leading Country of Origin, 1982, 1983
 (Quantity in thousands of units, unless otherwise stated)

	Quantity		% Change 1983/1982	C.I.F. Value* (Thous. \$)		% Change 1983/1982
	1983	1982		1983	1982	
Sheets & pillowcases of vegetable fibers, nspf	6,839.2	4,407.9	+ 55.2%	\$26,650	\$15,970	+ 66.9%
Portugal	1,880.8	748.1	+151.5	7,764	3,684	+110.7
Mainland China	1,570.4	1,850.1	- 15.1	3,893	3,792	+ 2.7
Hong Kong	645.7	194.7	+231.6	2,082	648	+221.3
Curtains & draperies, of vegetable fiber, not ornamented, nspf	84.1	50.9	+ 65.2	498	395	+ 26.1
Mainland China	32.7	na	--	65	na	--
United Kingdom	13.1	41.4	- 68.4	155	275	- 43.6
Canada	10.7	na	--	84	na	--
Towels, of vegetable fibers, not ornamented, nspf	206,419.5	200,963.7	+ 2.7	117,886	115,106	+ 2.4
Pakistan	107,915.5	85,858.7	+ 25.7	32,924	33,352	- 1.3
Mainland China	36,274.6	64,255.8	- 43.5	17,825	25,055	- 28.9
Taiwan	18,303.6	9,338.7	+ 96.0	15,894	10,867	+ 46.3
Shop towels, cotton, not ornamented, jacquard-figured, or pile or tufted	93,867.5	94,189.4	- 0.3	8,173	8,350	- 2.1
Mainland China	51,612.3	84,102.0	- 38.6	4,433	7,330	- 39.5
Pakistan	28,479.1	6,648.4	+328.4	2,496	658	+279.3
Hong Kong	7,062.4	1,779.0	+297.0	678	189	+258.7
Blankets & traveling rugs, vegetable & man-made fibers, nspf	1,838.2	730.1	+151.8	11,884	5,520	+115.3
Spain	704.5	71.2	+889.5	5,367	934	+474.6
Fr. Germany	515.2	301.7	+ 70.8	3,533	2,766	+ 27.7
Mainland China	129.2	84.5	+ 52.9	387	274	+ 41.2
Bedding, textile material, nspf (1,000 lbs.)	4,404.9	3,613.2	+ 21.9	22,530	18,406	+ 22.4
Mexico	1,086.7	860.1	+ 26.3	3,824	3,176	+ 20.4
India	704.6	1,082.7	- 34.9	2,960	3,952	- 25.1
Mainland China	571.2	338.9	+ 68.5	3,955	4,082	- 3.1
Tablecloths & napkins of vegetable fibers, not ornamented, nspf	5,140.1	5,325.9	- 3.5	14,699	14,410	+ 2.0
Mainland China	1,481.3	1,134.2	+ 30.6	3,770	2,772	+ 36.0
Pakistan	777.1	885.5	- 12.3	1,570	1,701	- 7.7
Hong Kong	593.6	916.8	- 35.3	1,248	2,124	- 41.2

(continued)

FOREIGN TRADE

Imports

Imports of Specified Home Textiles
By Leading Country of Origin, 1982, 1983
(Quantity in thousands of units, unless otherwise specified)
(continued)

	Quantity		% Change 1983/1982	C.I.F. Value* (Thous. \$)		% Change 1983/1982
	1983	1982		1983	1982	
Blankets & traveling rugs, wool (quantity in 1,000 lbs.)	445.3	247.0	+ 80.3%	\$ 2,196	\$ 2,075	+ 5.8%
United Kingdom	116.1	87.9	+ 32.1	1,057	869	+ 21.6
Uruguay	110.9	36.6	+203.0	505	163	+209.8
Iceland	24.9	32.6	- 23.6	245	231	+ 6.1

nspf not specially provided for

* The C.I.F. value is the import value at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135, December 1982, 1983

Exports

Eleven of the thirteen measured categories of home textiles exported by the U.S. registered a decline on a dollar basis in 1983. The largest of these declines was recorded in cotton blankets, whose value of exports fell 63.9% between 1982 and 1983. The second largest decline was recorded in the sheets group, with value of exports off 44.4% during the same period.

The largest category of U.S. exports in 1983 was towels and washcloths which fell by 9.9% on a unit basis while declining 7.3% on a dollar basis.

The strength of the U.S. dollar, plus a continuing lag in the economies of many countries abroad, are factors in the drop in exports.

FOREIGN TRADE

ExportsQuantity & Value of Exports of Specified Home Textiles, 1982, 1983

	Quantity (Thous. Units)		% Change 1983/1982	Value* (Thous. \$)		% Change 1983/1982
	1983	1982		1983	1982	
Sheets, total	5,899.2	10,992.5	- 46.3%	\$33,547	\$60,307	- 44.4%
Cotton	3,397.2	5,992.5	- 43.3	19,044	29,421	- 35.3
Man-made	2,502.0	5,000.0	- 50.0	14,503	30,886	- 53.0
Pillowcases, incl. bolsters, total	1,861.1	2,400.9	- 22.5	7,281	9,233	- 21.1
Cotton	1,069.1	1,457.5	- 26.6	4,809	6,089	- 21.0
Man-made	792.5	943.4	- 16.0	2,472	3,144	- 21.4
Sheets & pillowcases of textile materials, exc. cotton & man-made, total	2,776.6	4,778.4	- 41.9	13,951	19,106	- 27.0
Bedspreads, total	1,007.8	1,094.9	- 8.0	9,824	12,245	- 19.8
Cotton	587.5	581.2	+ 1.1	5,628	6,906	- 18.5
Other textile fibers	420.3	513.7	- 18.2	3,656	5,339	- 31.5
Coverlets, quilts & comforters, total	163.2	194.7	- 16.2	2,614	2,854	- 8.4
Cotton	53.8	68.1	- 21.0	640	941	- 32.0
Other textile fibers	109.4	126.6	- 13.6	1,974	1,913	+ 3.2
Blankets, cotton	129.1	492.1	- 73.8	899	2,493	- 63.9
Other blankets, exc. electric, of other textile fibers, exc. cotton, total	292.7	456.1	- 35.8	1,996	2,931	- 31.9
Other bedding, incl. mattress & pillow covers of text. fibers, ns pf, total	374.4	759.7	- 50.7	2,082	3,037	- 31.4
Curtains & drapes, net or lace, of textile fibers, total	89.5	118.0	- 24.1	411	430	- 4.4
Other curtains & drapes, total	1,503.5	1,059.2	+ 41.9	13,170	10,573	+ 24.6
Cotton	367.6	238.4	+ 54.2	1,633	1,133	+ 44.1
Man-made	202.2	197.9	+ 2.2	3,038	22,452	+ 86.5
Other	933.7	622.9	+ 49.9	8,499	6,988	+ 21.6
Towels & wash cloths, total	8,568.8	9,511.9	- 9.9	31,198	33,649	- 7.3
Cotton	6,860.9	7,652.2	- 10.3	24,965	27,659	- 9.7
Other	1,707.9	1,859.4	- 8.1	6,233	5,990	+ 4.1
Tablecloths & napkins, total	1,635.9	1,896.5	- 13.7	6,717	7,498	- 10.4
Cotton	464.3	674.3	- 31.1	2,274	2,932	- 22.4
Other	1,171.6	1,222.2	- 4.1	4,443	4,566	- 2.7

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles, 1982, 1983 (continued)

	Quantity (Thous. Units)		% Change 1983/1982	Value* (Thous. \$)		% Change 1982/1983
	1983	1982		1982	1983	
Other furnishings, incl. tapestries, of textile fibers, nsfp (lbs.) total	1,194.8	1,026.7	+ 16.4	\$4,815	\$4,569	+ 5.4%

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the carrier as well as any other costs beyond the port of exportation.

nsfp not specially provided for.

Source: U.S. Bureau of the Census,
U.S. General Exports, December 1982, 1983.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

A major catalyst to home textiles sales lies in the formation of new households. With the baby boom generation of the 1950's and 60's now in their prime years, the number of new households has risen dramatically. Between 1970 and 1983, the number of households in the U.S. rose a whopping 32.4% to a total of 83.9 million units.

Households in 1983 tend to be quite different from the pattern some years ago. The most dramatic difference is in the size of the household. In 1970, only one in ten households contained one person. By 1983, this figure has doubled to nearly one in five. Conversely the number of large households (five or more persons) has tumbled during this period. Households of this size accounted for 20.9% of the total in 1970 compared with 12.8% in 1983.

U.S. Households by Size & by Marital Status of Head, 1983

	Number of Households (Mil. Units)			% Change		% of total Households		
	1983	1980	1970	1983/ 1980	1983/ 1970	1983	1980	1970
Total	83.9	79.1	63.4	+ 6.1%	+ 32.3%	100.0%	100.0%	100.0%
Household size:								
1 person	19.2	17.8	10.9	+ 7.9	+ 76.1	22.9	22.5	17.1
2 persons	26.4	24.7	18.3	+ 6.9	+ 44.3	31.5	31.2	28.9
3 persons	14.8	13.8	10.9	+ 7.2	+ 35.8	17.6	17.4	17.3
4 persons	13.3	12.5	10.0	+ 6.4	+ 33.0	15.9	15.8	15.8

(continued)

THE POTENTIAL MARKET

U.S. Households by Size & by Marital Status of Head, 1983 (continued)

	Number of Households (Mil. Units)			% Change		% of total Households		
	1983	1980	1970	1983/ 1980	1983/ 1970	1983	1980	1970
Household size: (cont'd.)								
5 persons	6.1	6.0	6.6	+ 1.7	- 7.6	7.3%	7.6%	10.3%
6 persons	2.5	2.5	3.5	--	- 28.6	2.9	3.2	5.6
7 or more persons	1.6	1.8	3.2	- 11.1	- 50.0	1.9	2.3	5.0
Marital status of head of household:								
Married, spouse present	49.9	48.1	52.4	+ 3.7	- 4.8	59.5	60.8	82.6
Married, spouse absent	3.8	3.7	1.0	+ 2.7	+280.0	4.5	4.7	1.6
Separated	3.0	2.9	na	+ 3.4	na	3.6	3.7	na
Widowed	10.9	10.5	5.7	+ 3.8	+ 91.2	13.0	13.3	9.0
Divorced	8.9	7.4	1.5	+ 20.3	+493.3	10.6	9.4	2.4
Single, never married	10.4	9.4	2.8	+ 10.6	+271.4	12.4	11.9	4.4

na = not available

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Characteristics,
Series P-20, Nos. 388, 366, 349

A rise in the number of marriages, as well as the growing tendency of singles to live alone, are factors in the growth in households. Better economic conditions also help, cutting down on doubling-up. According to the National Center for Health Statistics, preliminary figures for 1983 indicate the first decline in the number of marriages performed since 1975. The center reported 2,444,000 marriages in 1983, 2% less than in 1982, but still a larger number than in 1981. The marriage rate also dropped in 1983, falling to 10.5 per 1,000 population.

Marriages & Marriage Rates in the U.S., 1978 - 1983

Year	Number	Rate per 1,000 of Total Population
1983(p)	2,444,000	10.5
1982	2,495,000	10.8
1981	2,438,000	10.6
1980	2,390,252	10.6
1979	2,331,337	10.4
1978	2,282,272	10.3

(p) preliminary

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics,
Monthly Vital Statistics Report.

THE POTENTIAL MARKET

Another major boom for the home textiles market is new housing. After two difficult years, (1981 & 1982) the number of housing starts, as well as the number of authorized housing permits, skyrocketed in 1983. Housing resales were also estimated to have risen dramatically in 1983 after off-performances in 1981 and 1982.

Analysts believe that the rise in building should continue as long as interest rates remain stable. However, many analysts believe that a rise of interest rates above 15% could again choke off sales in the housing industry.

In the first three months of 1984, starts of privately-owned housing were 15% above the total in the same 1983 period.

U.S. Privately-Owned Housing Activity, 1981-1983 (Thousands of Units)

	1983(p)	1982	1981	% Change 1983/1982
Housing starts (privately owned)	1,703.1	1,062.2	1,084.2	+ 60.3%
Housing permits authorized	1,596.8	1,000.5	985.5	+ 59.6
New housing sales	625.0	412.0	436.0	+ 51.7
Housing resales	2,704*	1,990.0	2,419.0	+ 35.9

* Estimate

Source: U.S. Bureau of the Census,
Construction Reports Division;
National Association of Realtors.

RETAIL SALES BY PRODUCT

According to the HFD Textiles Report, sales of home textiles in 1982 were estimated at \$11.1 billion. Window coverings, the biggest group of textiles, accounted for one-third of all home textiles sales in 1982, according to HFD. Bed linens was the second largest grouping (\$3.4 billion in sales).

The single largest product as far as sales are concerned was towels. Sales were reported at \$1.3 billion in 1982, followed by sheets and pillowcases, at \$1.295 billion.

Retail Sales of Major Home Textiles Categories, 1982 (Millions of Dollars)

	1982
Home textiles sales, total	\$ 11,068
Bed linens, total	3,444
Sheets & pillowcases	1,295
Blankets	682
Bedspreads	413
Mattress pads	190
Comforters	594
Bed pillows	270

(continued)

RETAIL SALES BY PRODUCT

Retail Sales of Major Home Textiles Categories, 1982 (Millions of Dollars) (continued)

	<u>1982</u>
Bath shop, total	\$ 2,063
Towels	1,326
Bath accessories	230
Shower curtains	165
Bath rugs, mats & carpets	342
Decorative home, total	1,284
Hollywood studio covers	15
Decorative pillows	158
Slipcovers (ready-made)	58
Furniture throws	61
Utility pillows	42
Decorative fabrics	500
Home sewing fabrics	450
Tabletop textiles, total	589
Table linens	345
Kitchen textiles	244
Window coverings, total	3,688
Curtains	645
Shades	425
Woven woods	140
Hardware	440
Draperiers	850
Vertical blinds	220
Mini blinds	880
Shutters	88

Source: HFD Textiles Report, May 23, 1983

RETAIL SALES BY TYPE OF OUTLET

The total retail market for home textiles is currently estimated at some \$15 billion. Two different reports, to be issued (according to the present schedule) by government sources later in 1984 should help in defining the size of the retail market more precisely, in terms of major product categories and outlet types.

One set of figures will be developed through the 1982 Census of Retail Trade, compiled by the U.S. Bureau of the Census. This will update information last compiled covering 1977 retail operations. (A complete census of retail trade is compiled every five years.)

RETAIL SALES BY TYPE OF OUTLET

As of July 1984, a few preliminary reports for specific outlet types have been issued by the Census Bureau which contain some information on trends in home textiles' contribution to total store volume, as noted in the following table.

Sales of Curtains, Draperies & Dry Goods As Percent of Total Store Sales 1982 & Earlier Census Years Where Reported

<u>Store Type</u>	<u>1982</u>	<u>1977</u>	<u>1972</u>	<u>1967</u>
Department stores*	5.0%	na	na	na
Variety stores	5.9	5.2%	6.4%	na
Floor covering stores	1.8	2.1	1.9	2.1%
Paint, glass, wallpaper stores	1.4	0.4	0.5	0.6

* Data for 1982 includes only owned departments, not leased departments. Comparable information is not available for earlier years. Discount stores that meet the definition of a department store are included in this store type.

na not available

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Reports.

The second set of figures is being developed by the U.S. Bureau of Labor Statistics. The study underway has been undertaken to update data for 1970-1971 consumer (family) expenditures by product, and will be used to revise weightings used in compiling the Consumer Price Index. Some figures will be released by the end of 1984, and detailed data by spring 1985, according to the BLS.

A trade source (The Discount Merchandiser, June 1984) estimates sales of home textiles in discount stores in 1983 at about \$3.3 billion. Many new developments have been taking place in the merchandising of home textiles. Conventional discounters have been trading up lines, while the off-price sector of discounting (such as K-mart) have opened specialized bed and bath outlets or expanded their home textiles departments.

Specialty stores were the major outlet for window coverings in 1982, according to the HFD Textile Report (May 23, 1983). This store type was the leader in five of the eight measured categories of window coverings in 1982.

Sales of other home textiles categories were distributed as follows in 1982, according to HFD estimates. As noted, there is considerable variation in market shares held by outlet types on specific products.

RETAIL SALES BY TYPE OF OUTLET

Percent of Dollar Sales of Major Home Textiles Categories By Type of Outlet, 1982

	Percent of Sales of Each Product by Outlet Type				
	Department Stores	Discount Stores	National Chains*	Specialty Stores	All Other Stores
Bed linens:					
Sheets & pillowcases	35%	37%	22%	4%	2%
Blankets	34	24	26	14	2
Bedspreads	26	19	32	22	1
Mattress pads	25	33	29	11	2
Comforters	28	22	32	17	1
Bed pillows	30	38	16	13	3
Bath shop:					
Towels	30	30	28	7	5
Bath accessories	27	20	20	32	1
Shower curtains	22	34	20	19	5
Bath rugs, mats & carpets	26	26	34	10	4
Decorative home:					
Hollywood studio covers	45	4	35	5	11
Decorative pillows	37	27	27	7	2
Slipcovers (ready-made)	10	10	53	3	24
Furniture throws	3	67	19	3	8
Utility pillows	13	56	27	3	1
Decorative fabrics	15	5	15	55	10
Home sewing fabrics	--	35	--	60	5
Tabletop textiles:					
Table linens	44	23	23	6	4
Kitchen textiles	24	37	23	9	7
Window coverings:					
Curtains	22	19	50	7	2
Shades	10	25	29	35	1
Woven woods	7	21	27	40	5
Hardware	5	22	37	33	3
Draperies	18	16	56	8	2
Vertical blinds	7	8	15	70	--
Mini blinds	11	12	11	65	1
Shutters	3	9	18	70	--

* Sears, Penney, Ward

Source: HFD Textiles Report,
May 23, 1983

RETAIL SALES BY TYPE OF OUTLET

Department Stores

According to the National Retail Merchants Association, sales per square foot in department stores with sales of \$1 million or more were higher for blankets, comforters and bed pillows than any other measured category of home textiles. The second highest sales per square foot was recorded by sheets and pillowcases (\$129.4).

Custom draperies and slipcovers had the highest number of stock turns of any measured home textiles, turning over an average of 4.0 times per year.

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over \$1 Million, 1982 (Median Results)

	Total Upstairs Store (103)*	Domestics, Draperies & Home Goods (99)*	Custom Draperies & Slipcovers (35)*	Bath Shop (40)*
Net sales, % change from last year	+ 3.8%	+ 2.0%	- 4.1%	- 3.9%
Sales, % to total store	90.7	6.1	0.5	0.4
Sales, % to total division	--	100.0	9.3	6.5
Gross margin, % of sales (including cash discounts)	41.9	41.6	42.7	47.2
Markdowns, % of sales	14.4	11.2	6.3	8.9
Sales promotion, % of sales	3.1	4.1	5.2	3.7
Number of stock turns (times)	2.7	1.9	4.0	1.6
\$ sales per sq. ft. of selling space (main or largest selling unit)	\$109.0	\$ 74.2	\$ 49.5	\$ 96.0
	Linens & Domestics (96)*	Sheets & Pillowcases (48)*	Blankets, Comforters & Bed Pillows (46)*	Table Linens & Other Table Coverings (48)*
Net sales, % change from last year	+ 3.3%	+ 4.2%	+ 4.8%	+ 2.7%
Sales, % to total store	4.1	0.8	1.0	1.1
Sales, % to total division	66.4	12.9	16.2	19.6
Gross margin, % of sales (including cash discounts)	41.7	47.4	43.0	40.0
Markdowns, % to sales	10.0	11.2	11.5	11.5
Sales promotion, % to sales	4.2	4.9	4.8	4.4
Number of stock turns (times)	2.0	2.0	2.2	2.0
\$ sales per sq. ft. of selling space (main or largest selling unit)	\$ 95.6	\$129.4	\$133.6	\$ 87.1

(continued)

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Specified Home Textiles

In Department Stores With Sales Over \$1 Million, 1982

(Median Results)

(continued)

	Towels (45)*	Window & Furniture Coverings (76)*
Net sales, % change from last year	+ 2.2%	- 0.5%
Sales, % to total store	1.0	1.0
Sales, % to total division	16.3	17.9
Gross margin, % of sales (including cash discounts)	44.9	41.6
Markdowns, % to sales	10.1	11.5
Sales promotion, % to sales	4.2	4.0
Number of stock turns (times)	2.2	1.5
\$ sales per sq. ft. of selling space (main or largest selling unit)	\$103.6	\$ 51.9

* Number in parenthesis represents the number of stores reporting in each category.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983.

Curtain, Drapery & Upholstery Stores

Between 1979 and 1981, the number of curtain, drapery and upholstery stores with payrolls operating in the U.S. dropped from 4,090 to 3,770. This compares with the total of 3,867 of these store types in operation in 1977, according to the U.S. Bureau of the Census. Sales of these store types in 1977 amounted to \$611.7 million, the last year for which sales figures are available.

There were also a total of 6,194 curtain, drapery and upholstery stores in operation in 1977 without payrolls. These stores accounted for an additional \$105.5 million in sales. In total, the 10,061 curtain, drapery and upholstery stores in operation in 1977 had a combined total of \$717.2 million in sales.

Drapery & Upholstery Stores by Employee Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. \$	% of Total
Upholstery & drapery stores, total	3,770	100.0%	19,511	100.0%	\$170.0	100.0%
By employee size:						
Under 10 employees	3,332	88.4	11,678	59.9	99.2	58.3
10 - 19 employees	350	9.3	4,746	24.3	41.2	24.2
20 - 49 employees	81	2.1	2,409	12.3	21.4	12.6
50 or more employees	7	0.2	678	3.5	8.2	4.9

Source: U.S. Bureau of the Census,
County Business Patterns, 1981

RETAIL SALES BY TYPE OF OUTLET

Leading Stores

According to a market analysis by HFD - THE WEEKLY HOME FURNISHINGS NEWSPAPER (2/6/84), Sears was the leading retailer of home textiles in 1983 with sales of \$1.5 billion in this single area. K mart rated second with sales of \$1.2 billion, while J.C. Penney ranked third with \$816 million in home textiles sales.

Three D Department Stores had the highest percentage of its sales attributed to the home textiles category, with 96% of its sales coming from the group.

The Top 25 Home Textile Retailers, 1983

<u>Rank</u>	<u>Store</u>	<u>Home Textiles Sales (Mil. \$)</u>	<u>% of Home Textiles to Total Store Sales</u>
1	Sears	\$1,474	6.7%
2	K mart	1,235	6.5
3	J.C. Penney	816	6.8
4	Dayton Hudson	479	7.8
5	Montgomery Ward	420	7.0
6	Federated	401	6.1
7	Wal-Mart	270	6.0
8	R.H. Macy	266	7.1
9	May Dept. Store	227	6.1
10	Associated Dry Goods	205	5.8
11	Allied Stores	205	6.8
12	Melville Corp.	170	15.0
13	BATUS	155	5.5
14	Spiegel	145	29.0
15	Carter Hawley Hale	135	6.5
16	Zayre	129	6.5
17	T.G. & Y	127	5.5
18	Fingerhut	125	23.0
19	Belk Stores	120	7.5
20	Mercantile	95	6.0
21	Fred Meyer	70	5.0
22	Dillards	60	7.0
23	Three D Depts.	49	96.0
24	Bradlees	48	5.0
25	Ames Dept. Store	43	9.0

Source: HFD-The Weekly Home Furnishings Newspaper,
February 6, 1984.

CONSUMER PRICE TRENDS

Consumer prices for textile home furnishings averaged 4.0% higher in 1983 compared with 1982--somewhat higher than the 3.2% gain registered for all consumer items (3.2%), according to the Bureau of Labor Statistics.

CONSUMER PRICE TRENDS

Between May 1983 and 1984, retail prices for textile home furnishings registered a slower increase than the all-item category, 3.4% vs. 4.2%.

Consumer Price Indexes for Specified Home Textiles, 1982, 1983 & May 1983, 1984 (All Urban Consumers) (December 1977 = 100, unless otherwise noted)

	May Average		% Change 1984/83	Annual Average		% Change 1983/82
	1984	1983		1983	1982	
All items (1967 = 100)	309.7	297.1	+ 4.2%	284.4	278.2	+ 2.2%
Textile home furnishings (1967 = 100)	236.4	228.7	+ 3.4	228.2	219.4	+ 4.0
Household linens	139.8	136.2	+ 2.6	135.5	133.5	+ 1.5
Curtains, drapes, slipcovers & sewing materials	154.6	149.4	+ 3.5	149.4	140.2	+ 6.6

Source: Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following information on home textiles purchases has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. Reports are based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

In 1983, home textiles purchases by panel members increased by 1.7% on a unit basis while rising 3.8% on a dollar value basis. The average price increase in 1983 vs. 1982 was 2.1%. Comforters were far and away the leader in increased sales in 1983 marking gains of 18.6% in units and 19.3% in dollars in 1983 vs 1982.

Percent Change in Unit & Dollar Purchases of Specified Home Textiles As Reported by NPD

	% Change: 1983/1982		
	Units	Dollars	Average Price Increase
Total, all categories	+ 1.7%	+ 3.8%	+ 2.1%
Sheets & pillowcases	+ 4.5	+ 4.3	- 0.2
All bathroom towels	--	+ 1.7	+ 1.2
Bath towels	--	+ 1.7	+ 1.7
Blankets	+ 0.4	+ 18.3	+ 17.9
Bedspreads	- 12.0	- 3.9	+ 9.2
Comforters	+ 18.6	+ 19.3	+ 10.6
Pillows	- 1.3	- 5.4	- 4.1

Source: Home Fashions Textiles
(Fairchild Publications) June 1984

CONSUMER BUYING HABITS

Between September 1982 and July 1983, Simmons Market Research Bureau conducted a study to measure consumers' purchases of specified products, including home textiles. The survey included the percentage of households purchasing specified items, the price paid and the region of the country the purchasing households are located. The results of the study were published in Home Fashions Textiles, July 1984.

The survey indicated that consumer purchases had declined slightly from the previous survey conducted in 1982.

Percentage of Households Purchasing Selected Items, 1983, 1982

	<u>1983</u>	<u>1982</u>
Electric blankets	3.3%	na
Other blankets	4.5	5.7%
Comforters & quilts	6.1	6.5
Sheets & pillowcases	16.1	17.3
Tablecloths & napkins	9.0	8.6
Custom-made curtains & draperies	1.5	2.7
Ready-made curtains & draperies	5.8	7.6
Towels	15.0	15.8

Home Textiles Purchases By Region, 1983

	<u>Electric Blankets</u>	<u>Other Blankets</u>	<u>Comforters & Quilts</u>	<u>Sheets & Pillowcases</u>	<u>Tablecloths & Napkins</u>	<u>Towels</u>
Northeast	17.5%	21.2%	22.2%	22.5%	23.7%	21.3%
North Central	26.5	28.5	26.4	24.3	25.8	25.5
South	35.5	31.5	28.5	32.8	31.6	34.0
West	20.5	18.9	22.9	20.4	18.8	19.2

	<u>Custom-made Curtains & Draperies</u>	<u>Ready-made Curtains & Draperies</u>
Northeast	25.7%	25.6%
North Central	27.0	26.1
South	28.8	33.1
West	18.5	15.3

Price Paid for Specified Home Textiles, 1983 (Percent of household purchasing)

	<u>Electric Blankets</u>	<u>Other Blankets</u>	<u>Sheets & Pillowcases</u>	<u>Tablecloths & napkins</u>	<u>Towels</u>
Less than \$25	80.1%	53.7%	44.8%	66.2%	55.4%
\$25 or more	19.9	46.3	55.2	33.8	44.6

(continued)

CONSUMER BUYING HABITS

Price Paid for Specified Home Textiles, 1983 (Percent of household purchasing) (continued)

	<u>Comforters & Quilts</u>		<u>Custom-made Curtains & Draperies</u>	<u>Ready-made Curtains & Draperies</u>
Less than \$50	53.0%	Less than \$150	27.0%	22.8%
\$50 or more	47.0	\$150 or more	73.0	77.2

Source: Simmons Market Research Bureau,
Home Fashions Textiles, July 1984

Another survey conducted by a national polling organization among 2,000 female heads of households indicated that the number of consumers who bought any type of home furnishings in 1983 was down 13 percentage points from the results of a survey conducted in 1981 (Home Fashions Textiles, April, 1984).

More than 51% of those surveyed indicated, however, they were only delaying purchases because of the economy.

Window Treatments

<u>Place of Purchase of Window Treatments</u>	<u>Percent</u>	<u>Types of Window Treatments Purchased</u>	<u>Percent</u>
Department stores	19%	Ready-made draperies	40%
Discounters	19	Curtains	32
Sears	18	Window shades	28
J.C. Penney	17	Sheers	22
Drapery Stores	12	Custom-made draperies	18
K mart	11	Horizontal blinds	11
Montgomery Ward	8	Woven wood shades	5
		Custom draperies	5
		Wood shutters	4
		Vertical blinds	3
		Pleated shades	1

Note: Totals add to more than 100% due to multiple answers. Type of treatment is based on all home owners who purchased window treatments for any room.

(continued)

CONSUMER BUYING HABITS

Comforters

Place of Purchase of Comforters, 1983

	<u>Percent</u>
Department stores	43%
Sears	14
J.C. Penney	13
Discounters	12
Bed & bath shop	9
K mart	7
Montgomery Ward	5

Bedspreads

Place of Purchase of Bedspreads, 1983

	<u>Percent</u>
Department stores	28%
Sears	15
Discounters	14
J.C. Penney	14
Montgomery Ward	9
K mart	8
Bed & bath shop	8
Mail order	7

Sheets

Place of Purchase of Sheets, 1983

	<u>Percent</u>
Department stores	38%
Discounters	22
J.C. Penney	20
Sears	15
K mart	12
Montgomery Ward	7
Bed & bath shop	6

Note: Totals add to more than 100% due to multiple answers.

Source: Home Fashions Textiles,
April 1984

CONSUMER BUYING HABITS

Seventeen Magazine's Back-To-School Survey, conducted in September 1982, projected purchases of home textiles by 1,505 respondents who attend high school or college to the universe of 8.7 million teenage female students. According to the study, expenditures for bedspreads reached a total of \$48.2 million.

Projected Purchases of Home Textiles by Teenage Female Students

	<u>Number Purchasing (Thous.)</u>	<u>Number Purchased (Thous.)</u>	<u>Total Expenditures (Thous.)</u>
Towels	718	3,815	\$ 37,311
Sheets/Pillowcases	876	2,023	33,984
Bedspreads	668	954	48,232

Source: Seventeen Magazine
Back-To-School Study, 1983

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying head-quarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of \$50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (\$15.00)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videoseystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, \$15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, \$15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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